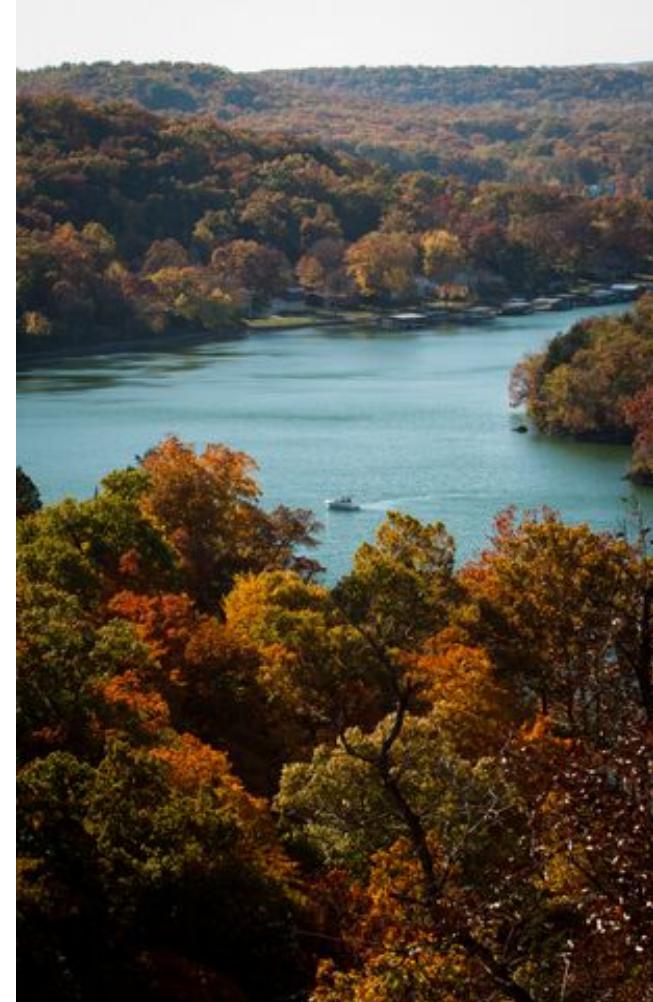




MISSOURI DIVISION OF TOURISM

September Missouri Travel Barometer
(Data available as of 11/10/20)

Missouri Travel Barometer



The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Lodging Trends – Week Ended October 31, 2020

OCCUPANCY
was down
37.0%
as compared to
the same week in
2019

**STATEWIDE
DEMAND**
DECREASED
36.1%

ADR
(Average Daily Room Rate)
DECREASED
20.6%

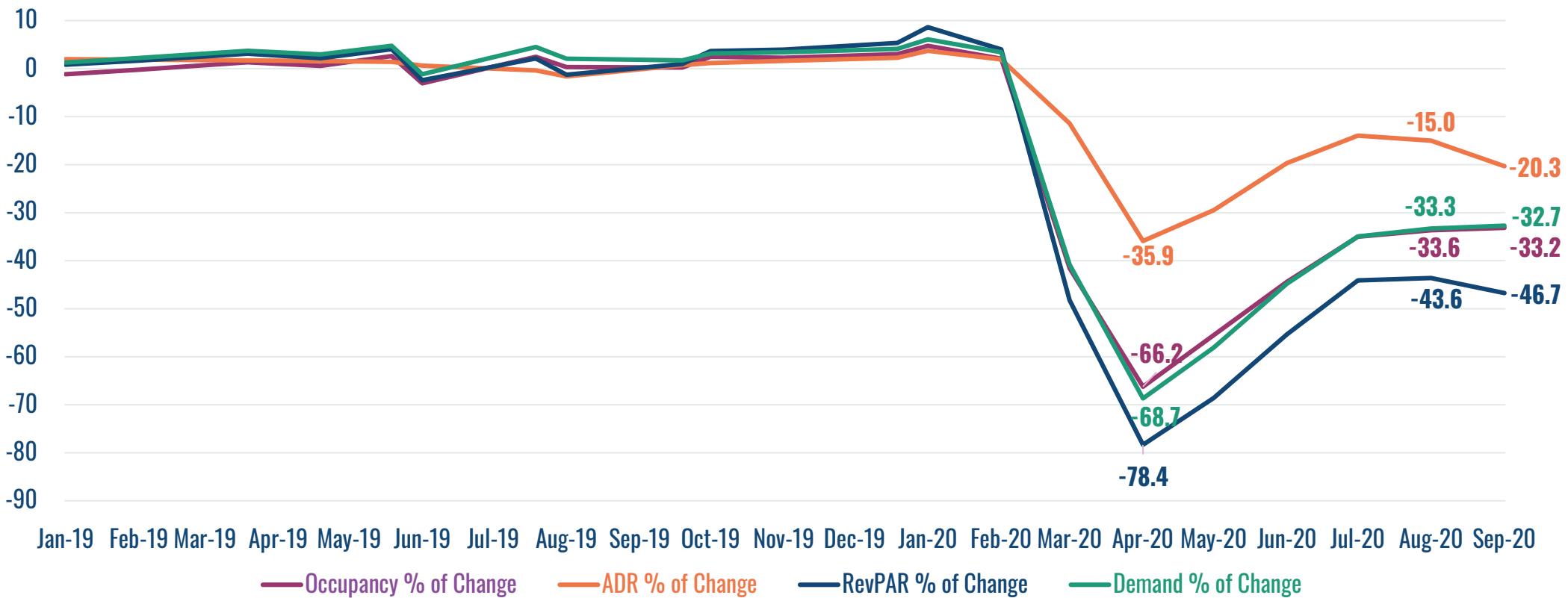
RevPAR
(Revenue per Available Room)
DECREASED
49.9%

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Monthly Lodging Trends Percentage of Change

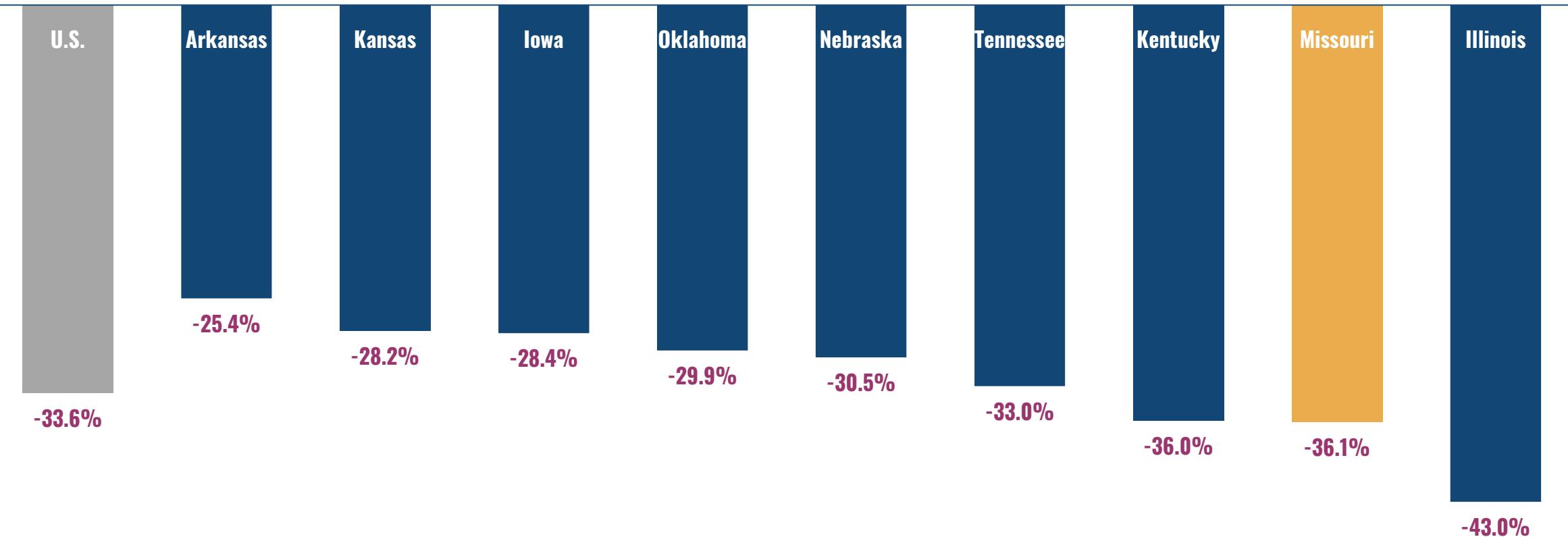


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Occupancy Percentage of Change -- September 2020 YTD vs September 2019 YTD Comparison of Neighboring States

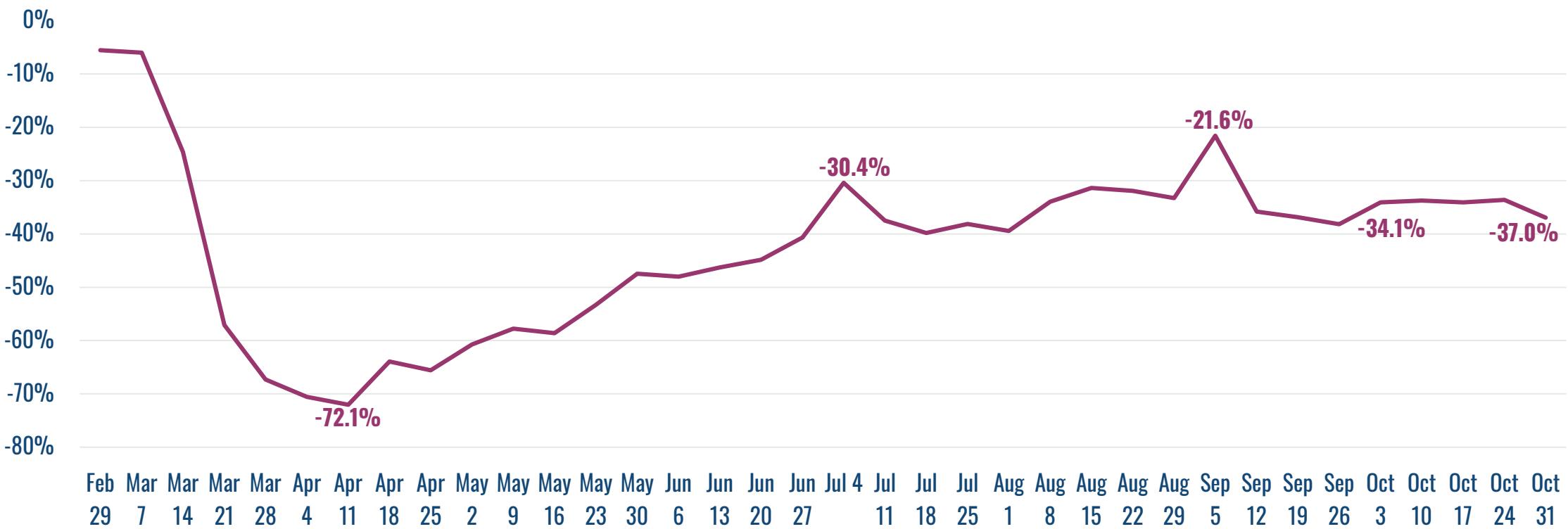


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Lodging Trends Occupancy % of Change from 2019

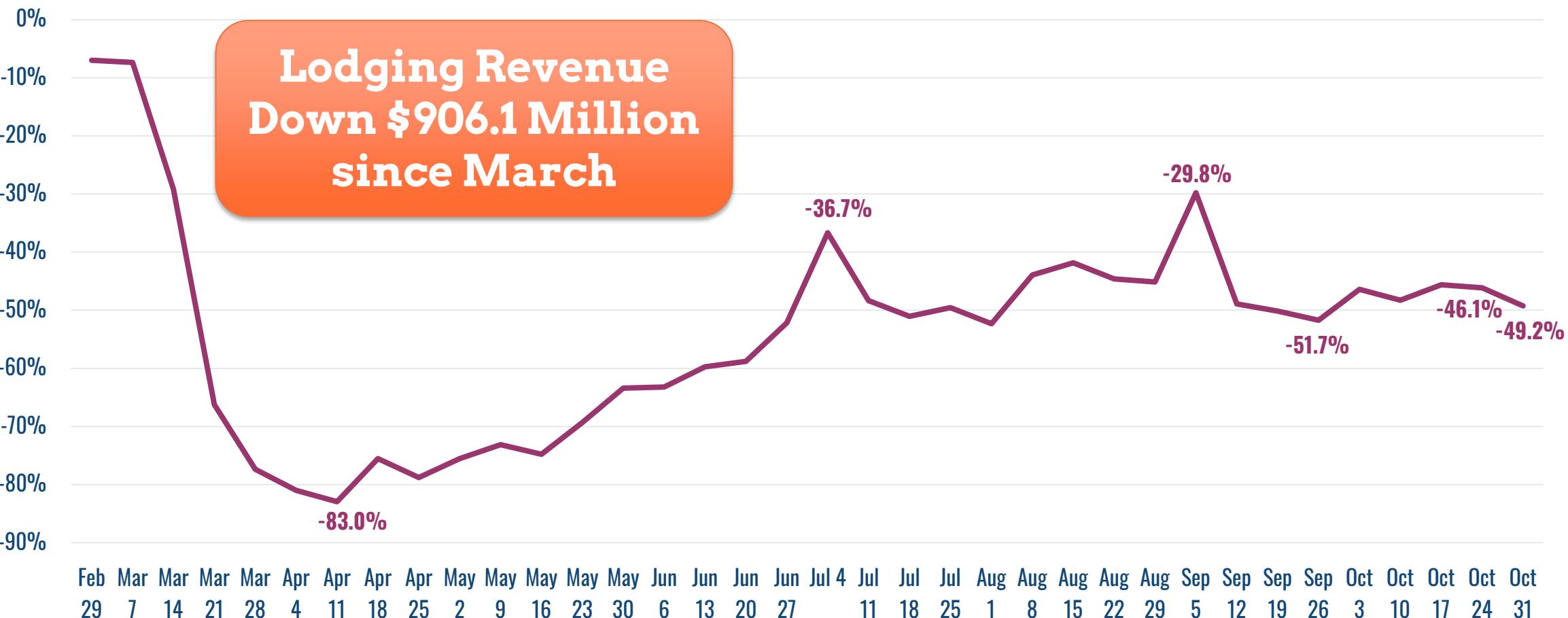


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Missouri Lodging Revenue % of Change from 2019



Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rental Trends for Hotel Comparable Rooms

January – September 2020 Compared to 2019

OCCUPANCY
was up
2.4%
as compared to
the time period in
2019

STATEWIDE DEMAND
INCREASED
18.7%

ADR
(Average Daily Room Rate)
INCREASED
9.8%

RevPAR
(Revenue per Available Room)
INCREASED
13.2%

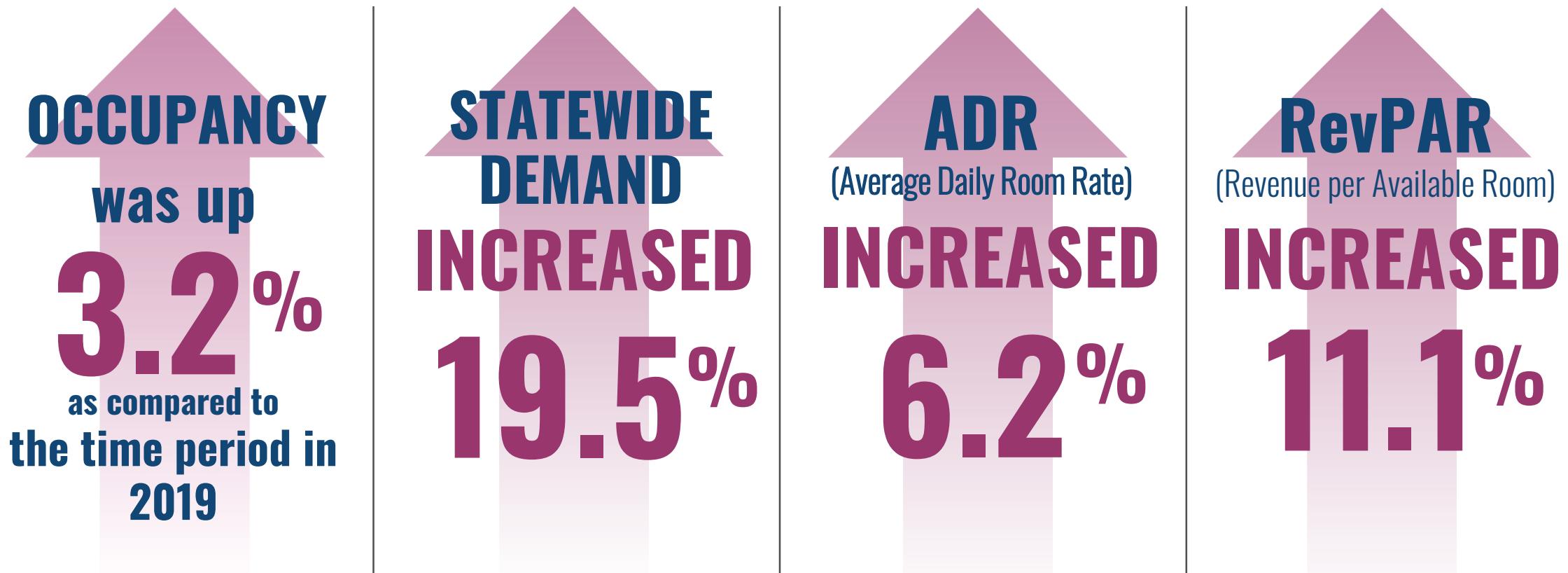
Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rental Trends for Entire Place Rentals

January – September 2020 Compared to 2019

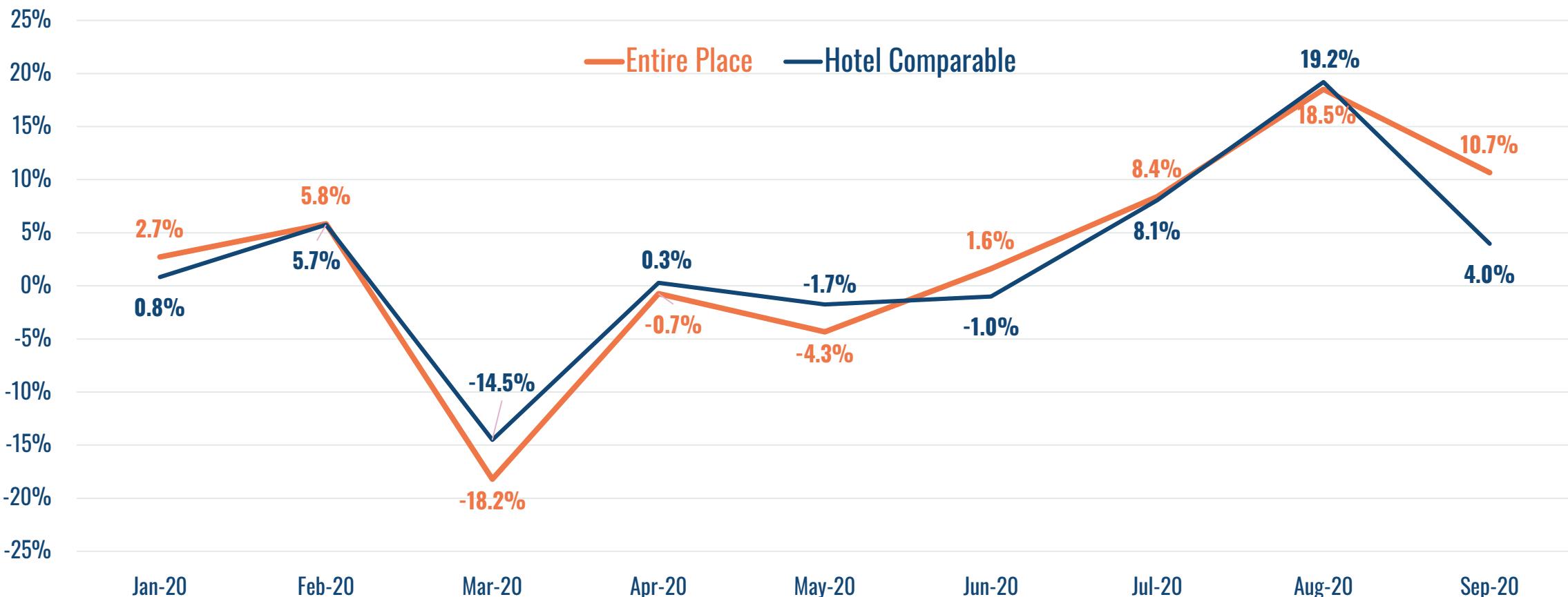


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rentals Occupancy% of Change from Prior Year



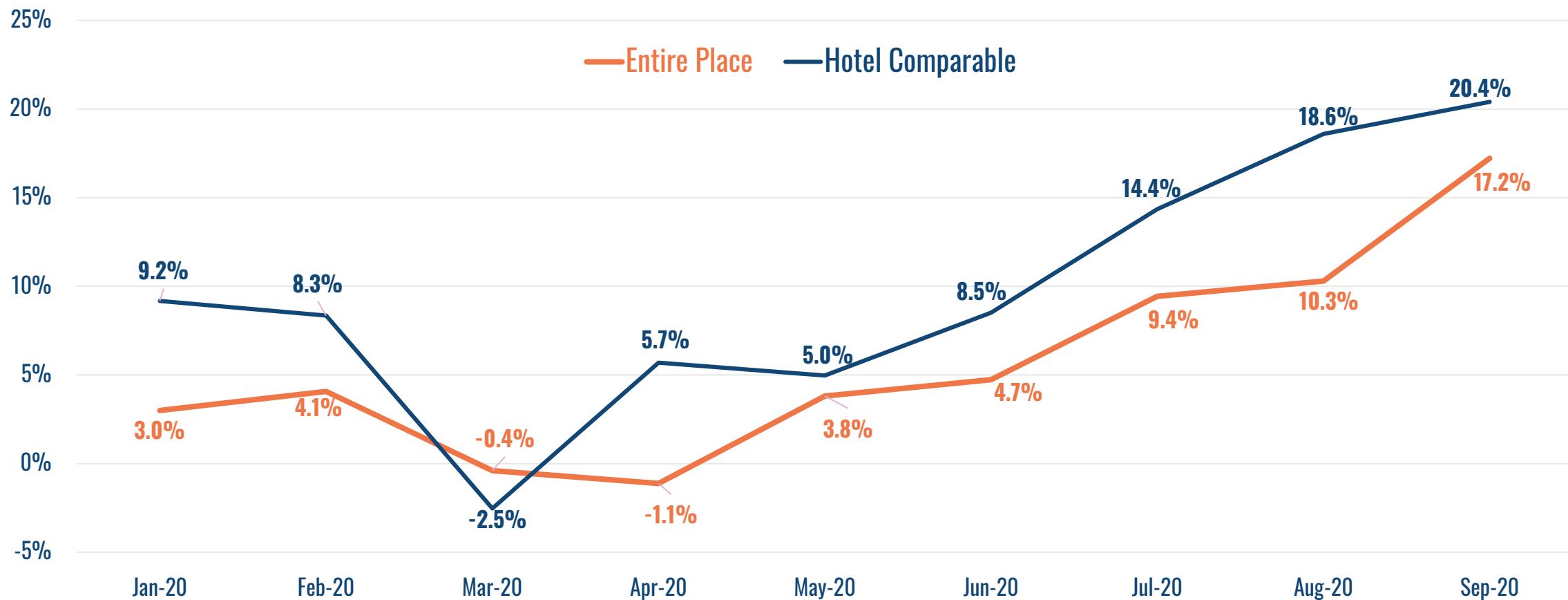
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rentals ADR % of Change from Prior Year



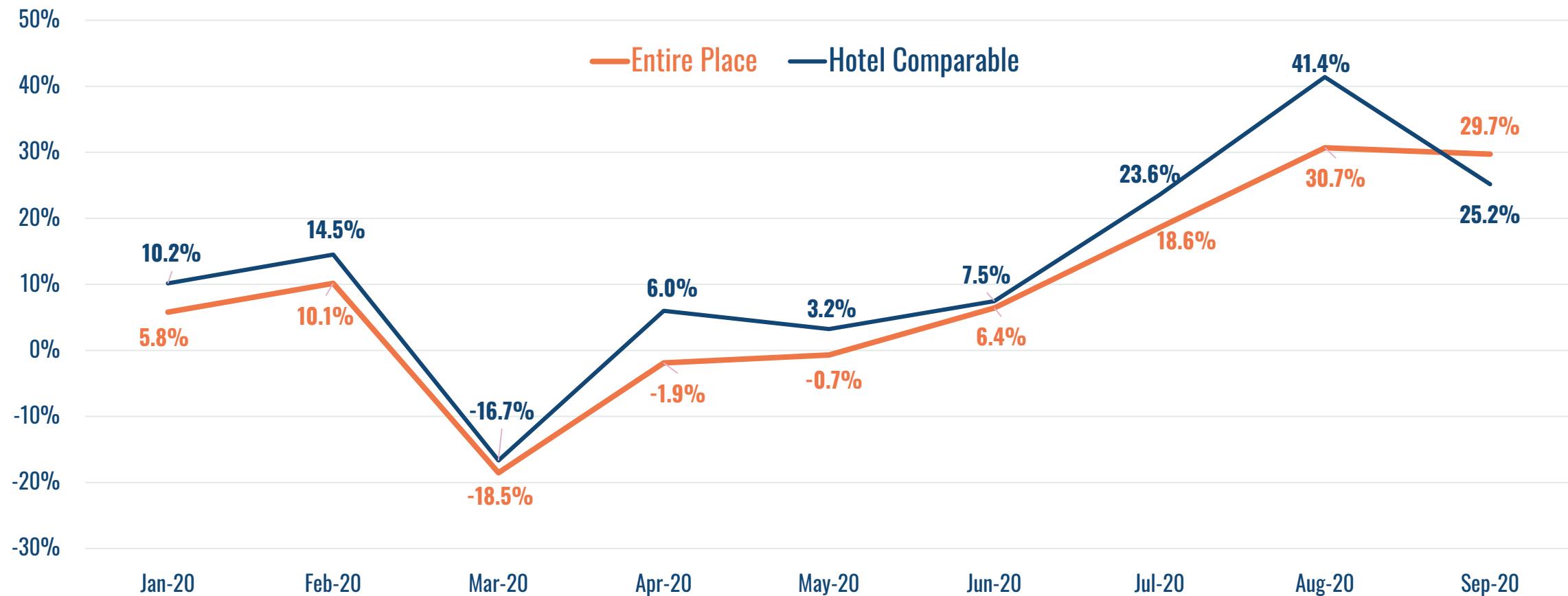
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales through August 2020

August 2020 saw a **-17.8%**
(\$218.5 million) **DECREASE**
in tourism-related sales revenue compared to August 2019

For FYTD20, preliminary reports for Jul-Jun indicate a **-10.9%**
(\$1.5 billion) **DECREASE** in tourism-related sales revenue

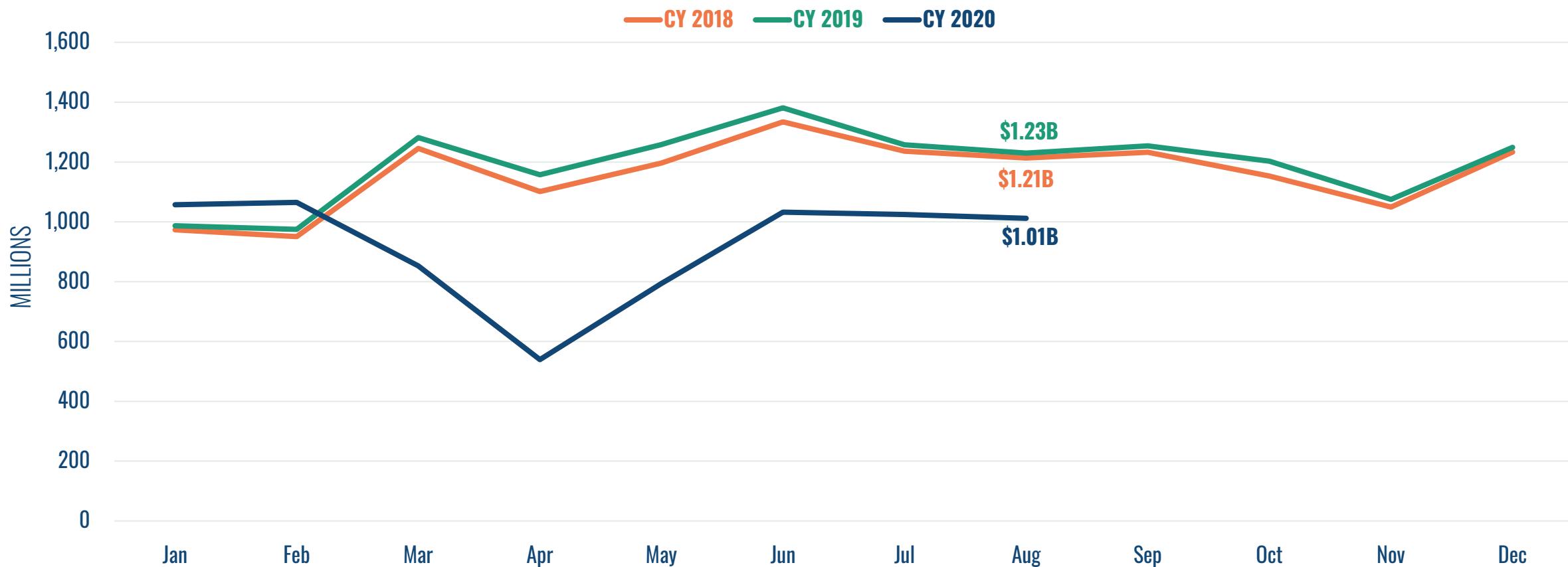
For CYTD20, preliminary reports for Jan-Aug show a **-22.6%**
(\$2.2 billion) **DECREASE** in tourism-related sales revenue

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CY Sales Revenue from Tourism-Related NAICS



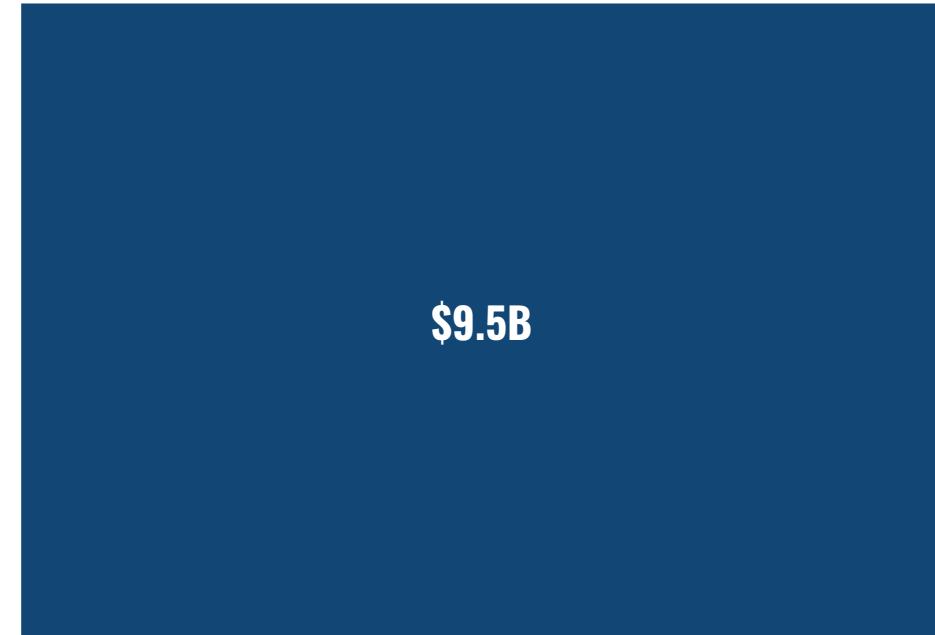
Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year

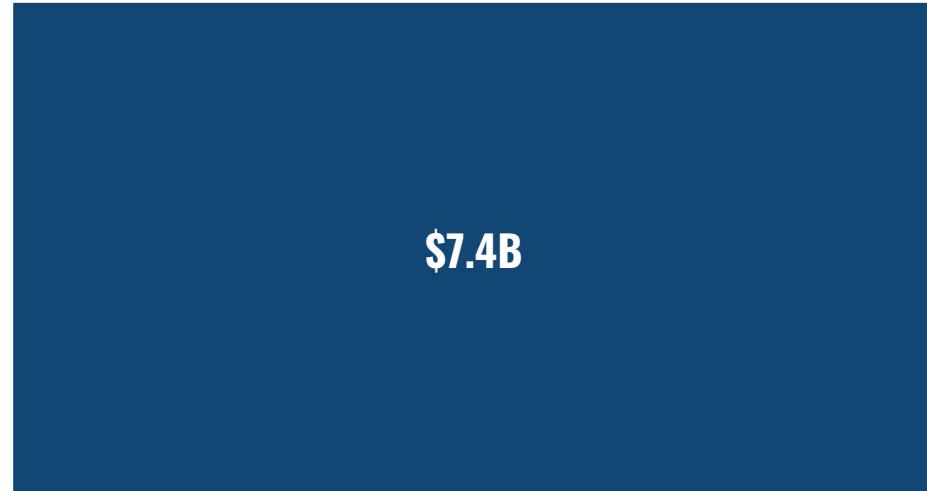


CYTD January - August Sales Revenue from Tourism-Related NAICS

BILLIONS



CYTD 2019



CYTD 2020

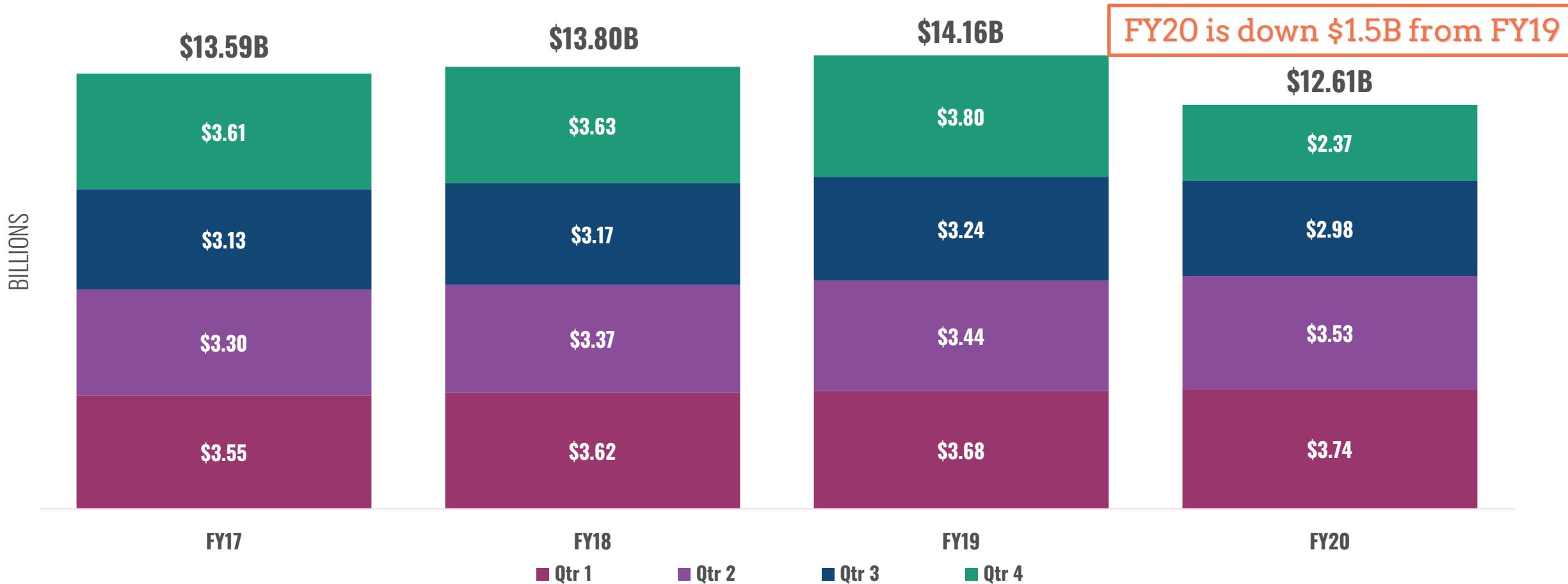
**\$2.2 Billion Loss
thru August**

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



FY Sales Revenue from Tourism-Related NAICS



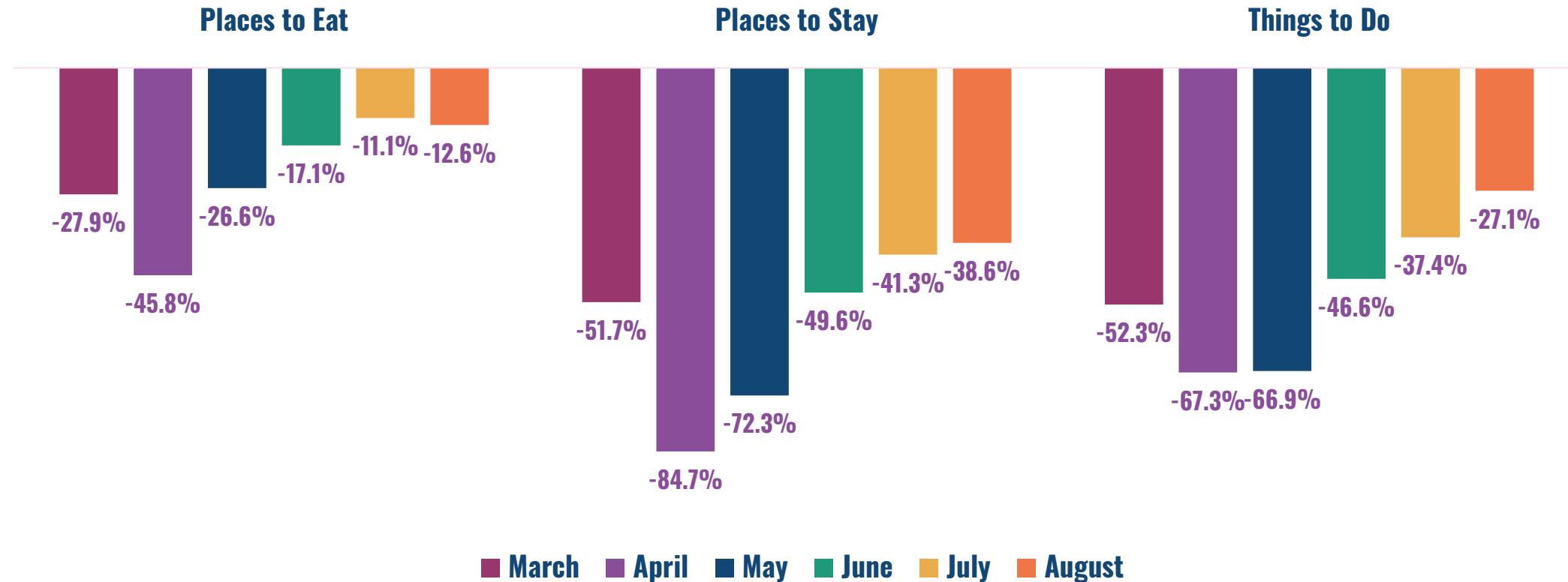
Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales

Change in March - August 2020 Compared to March - August 2019

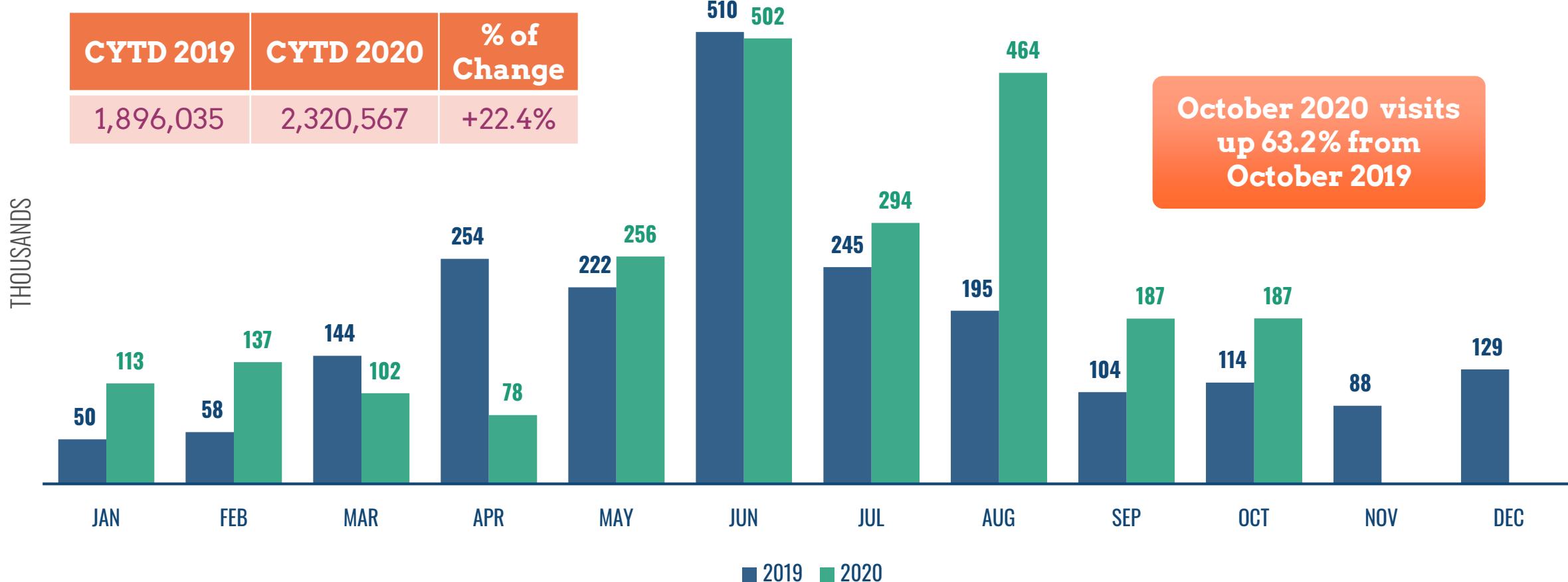


Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit responses in the early part of 2020



Calendar Year Visits to VisitMO.com by Month

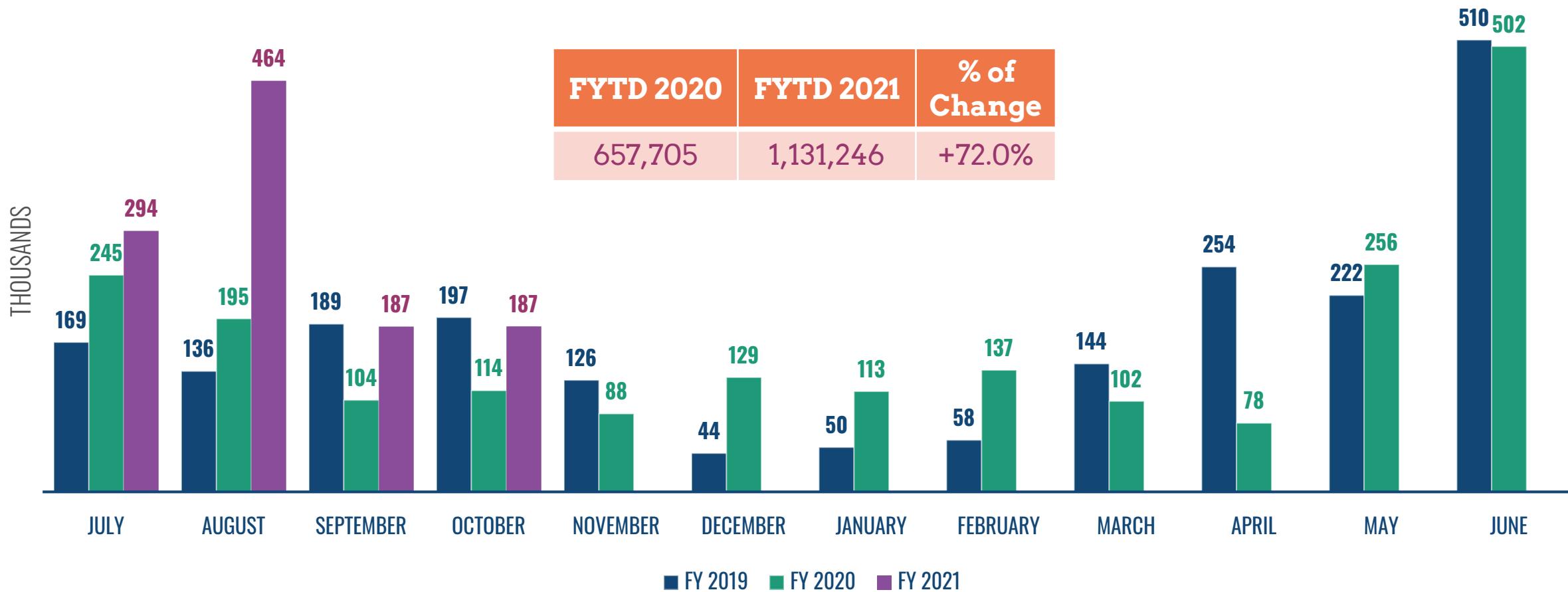


Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit responses in the early part of 2020



Fiscal Year Visits to VisitMO.com by Month



May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns.

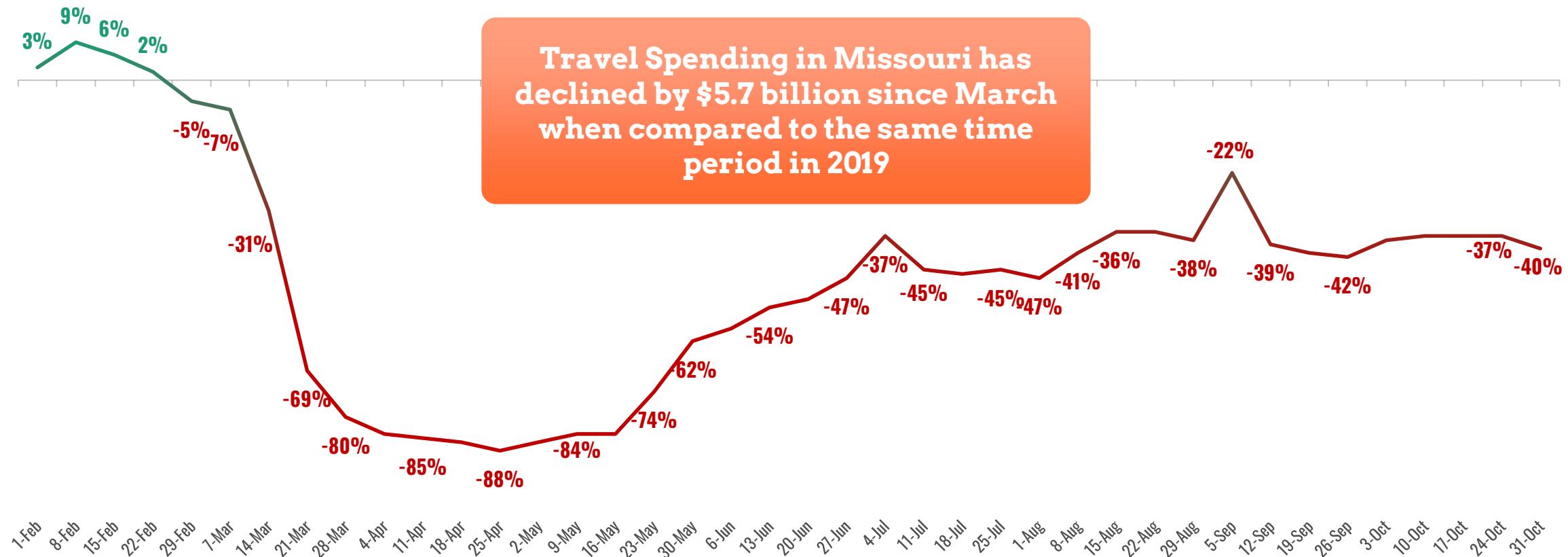
Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



Economic Impact

Year-Over-Year % Change in Weekly Travel Spending in Missouri

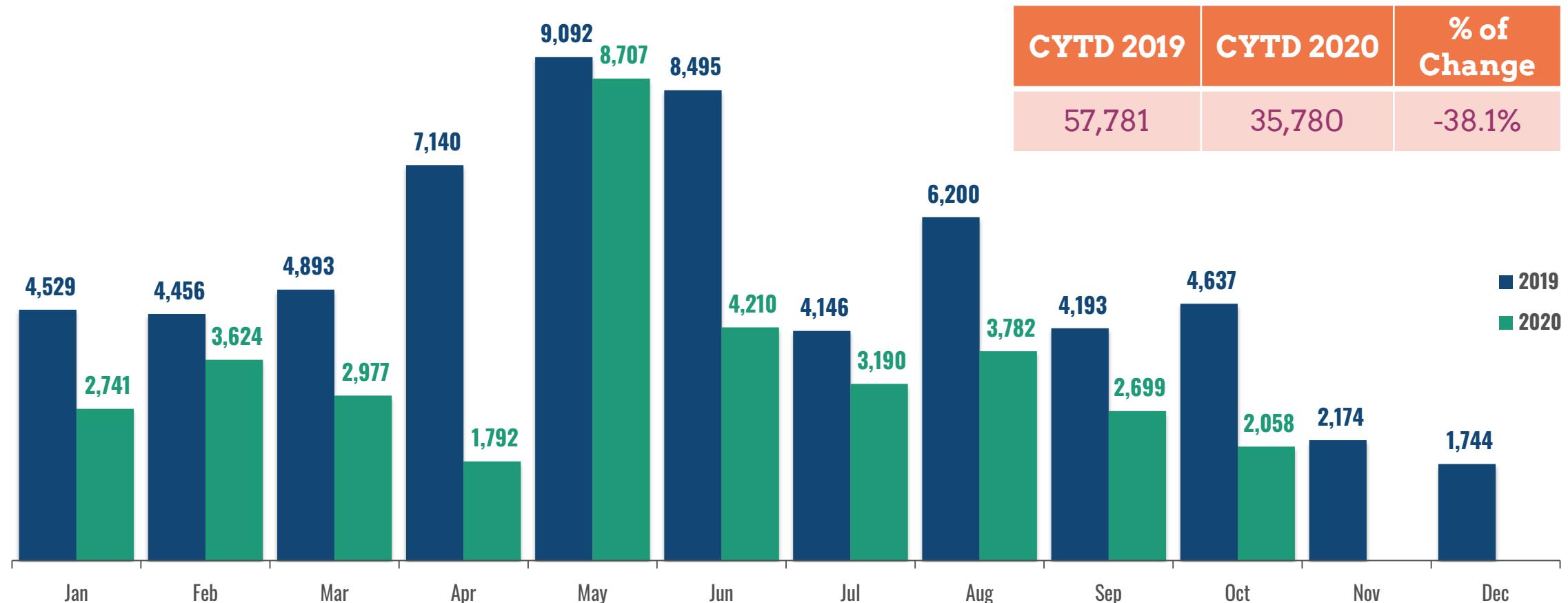


Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

Fulfillment of Travel Guide Orders from All Sources



Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.

Missouri Travel Barometer

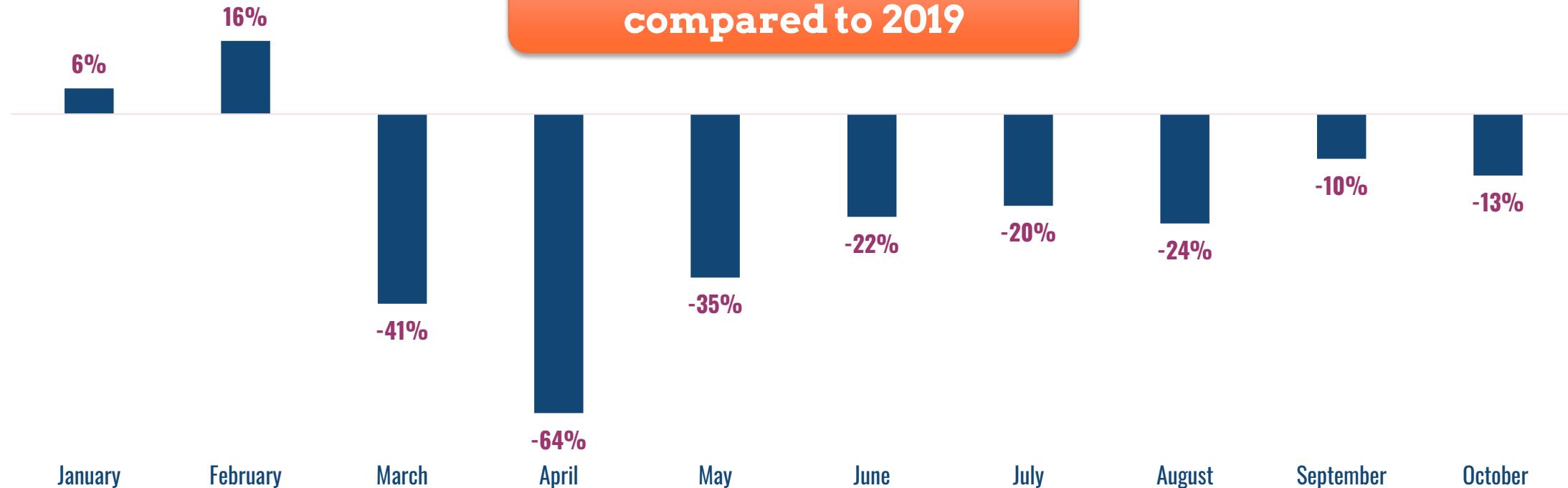
Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri



Road Trips to Missouri as Reported by Arrivalist

**% of Change in Road Trips to MO by Month
2020 Compared to 2019**

**-23% during Jan-Oct 2020
compared to 2019**



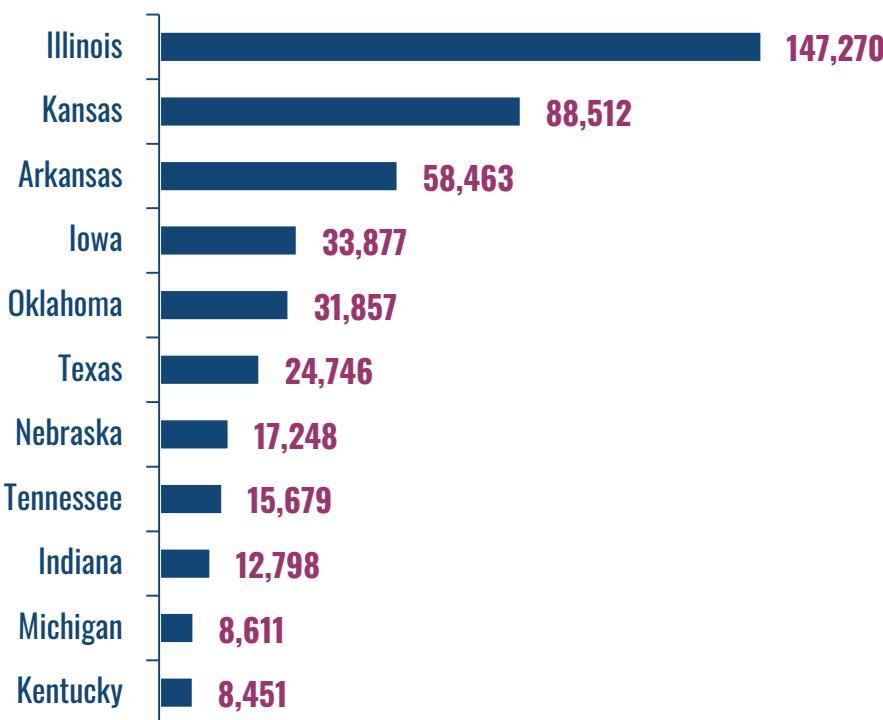
Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

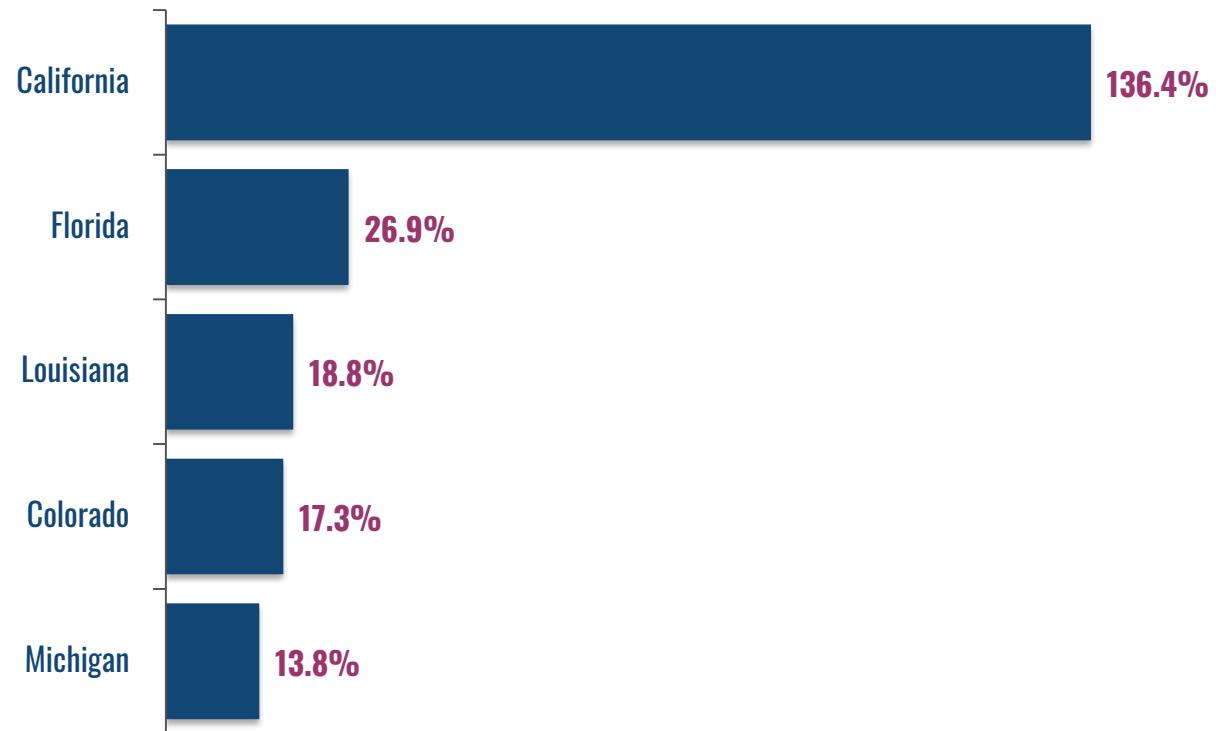


October Road Trips to Missouri as Reported by Arrivalist

Top Nearby States for October Road Trips to MO



Top States that Increased Road Trips to MO Oct 2020 % of Increase over Oct 2019

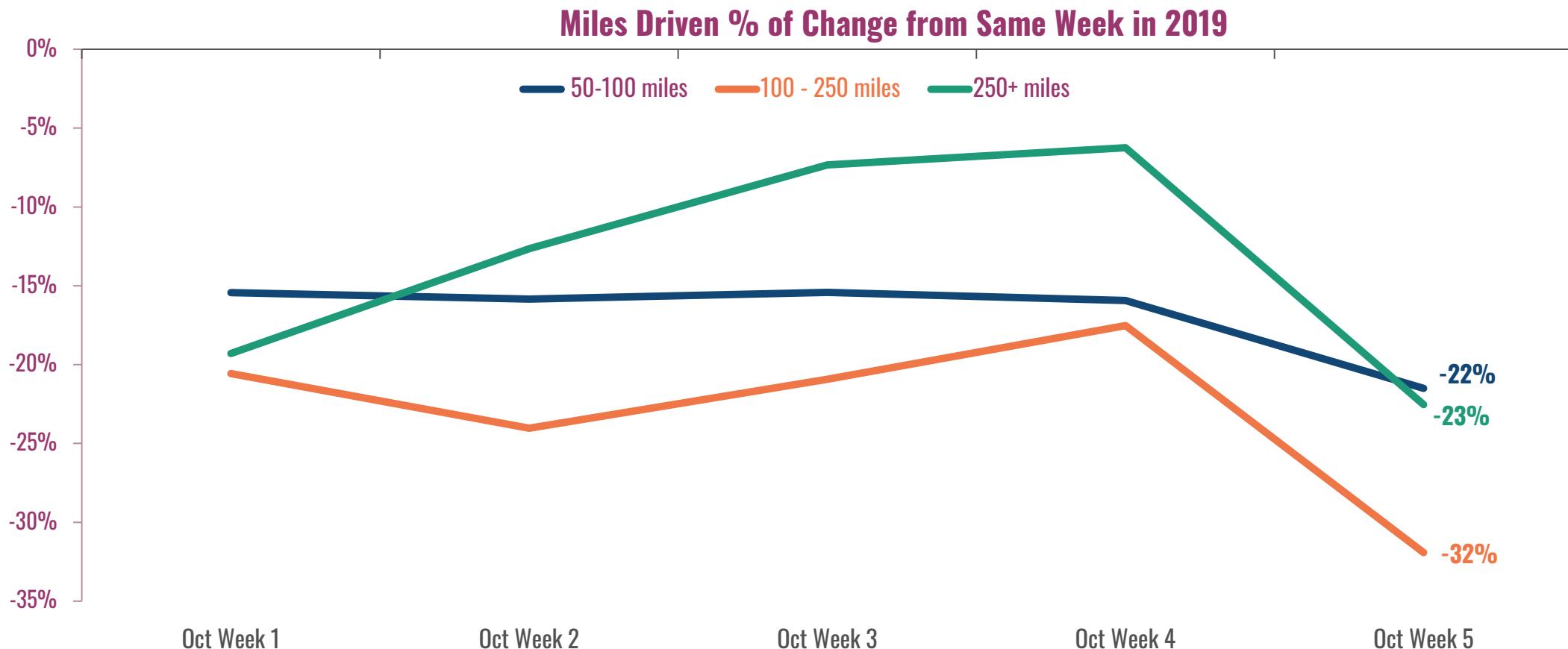


Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri



Road Trips to Missouri as Reported by Arrivalist



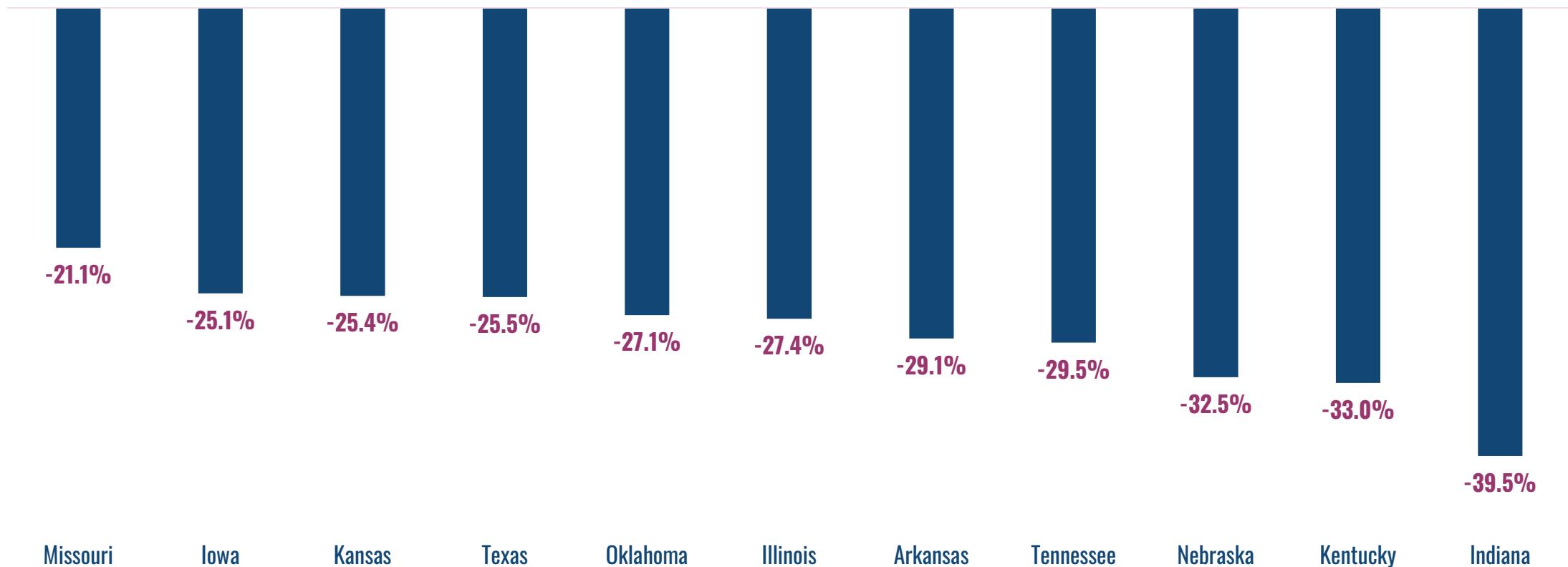
Missouri Travel Barometer

Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri



January – October Road Trips to Missouri as Reported by Arrivalist

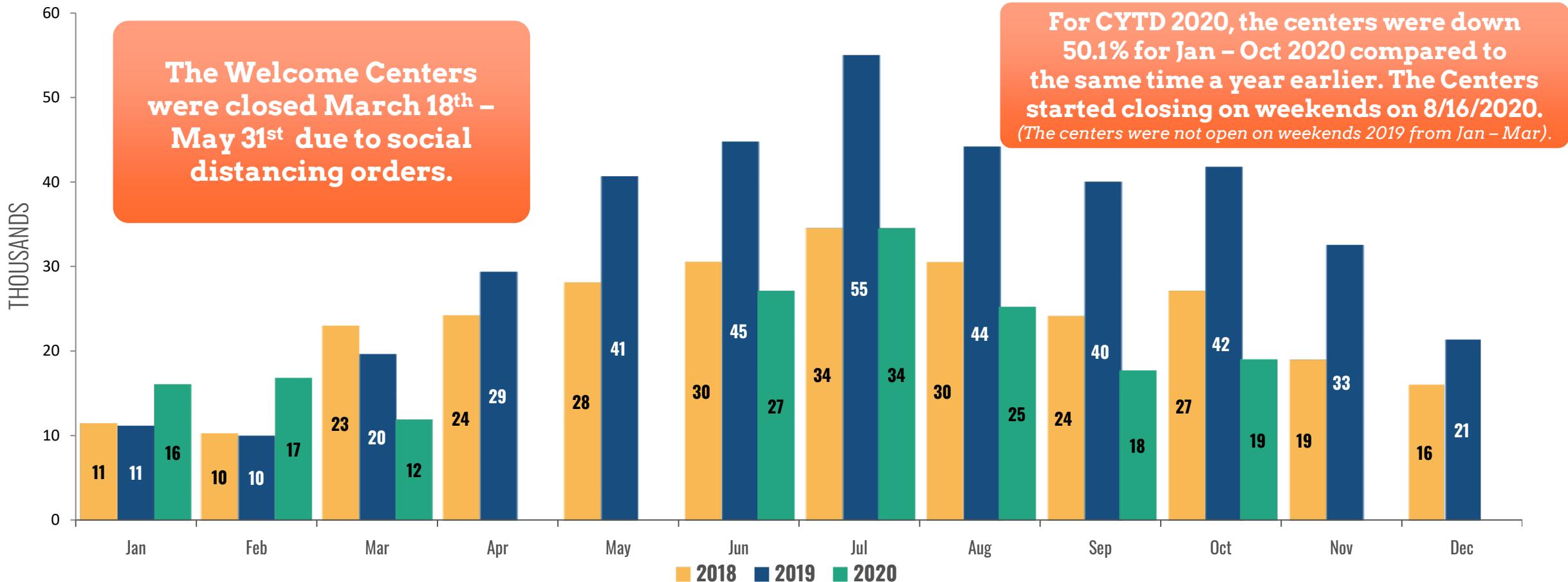
**% of Change in Road Trips to MO by Nearby States
2020 Compared to 2019**



Missouri Travel Barometer



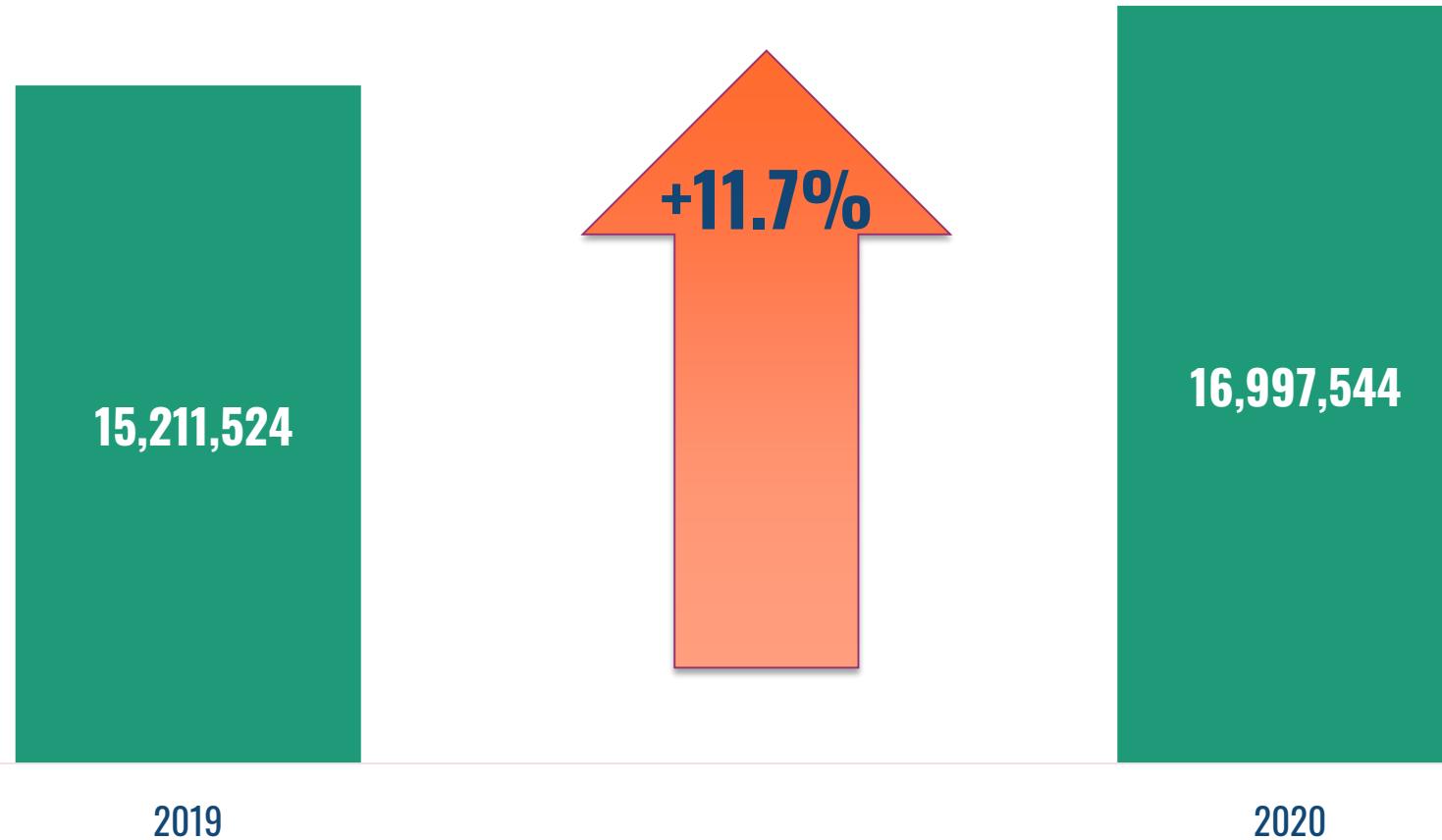
Welcome Center Visits: 2020 Calendar Year to Date through October



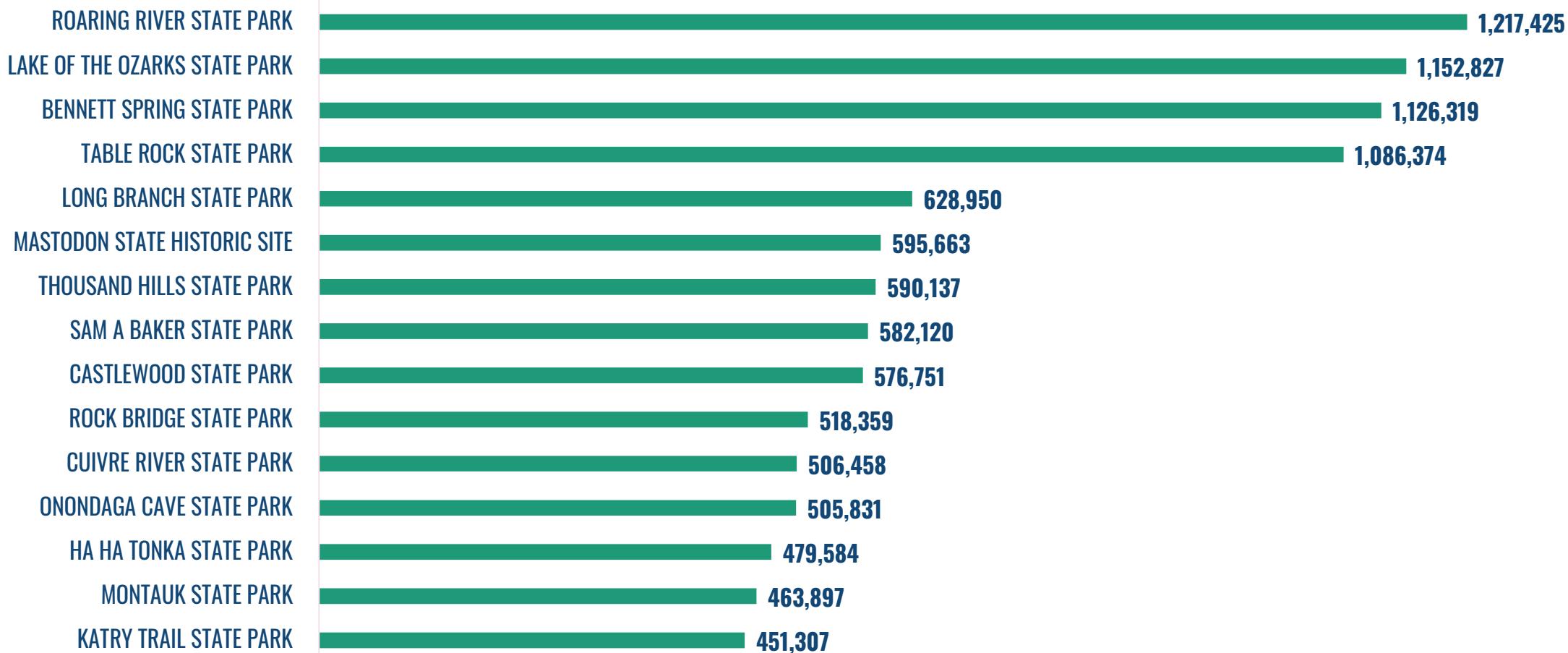
Missouri Travel Barometer



Visitors to Missouri State Parks during January - September

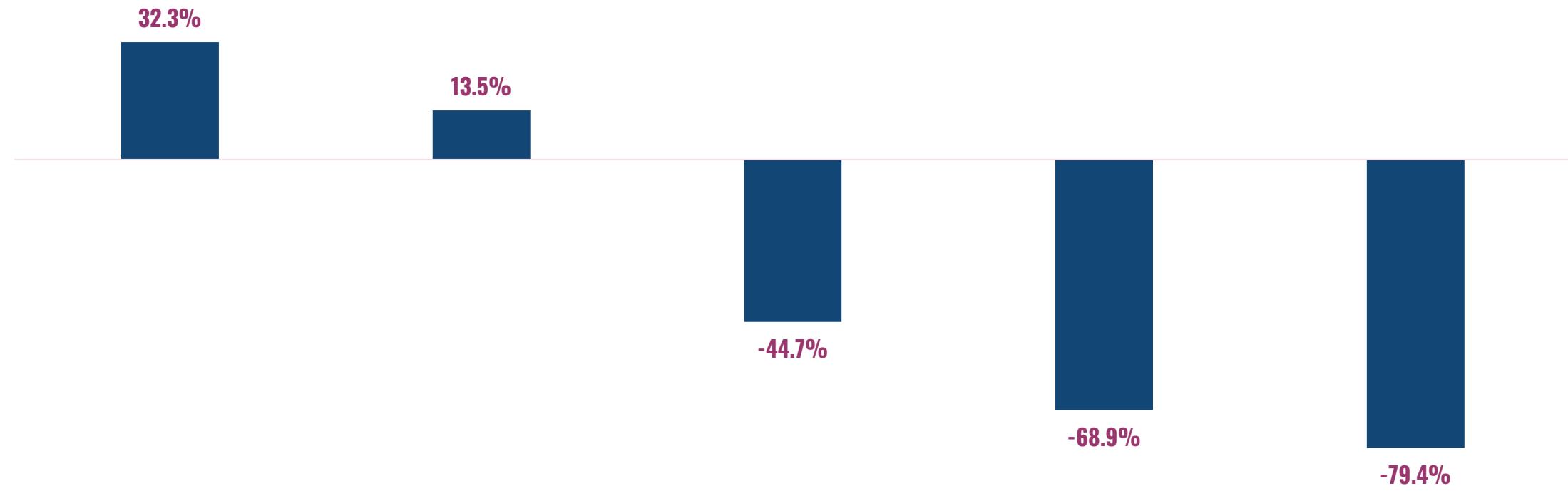


Most Visited Missouri State Parks during January - September



Missouri National Parks Attendance

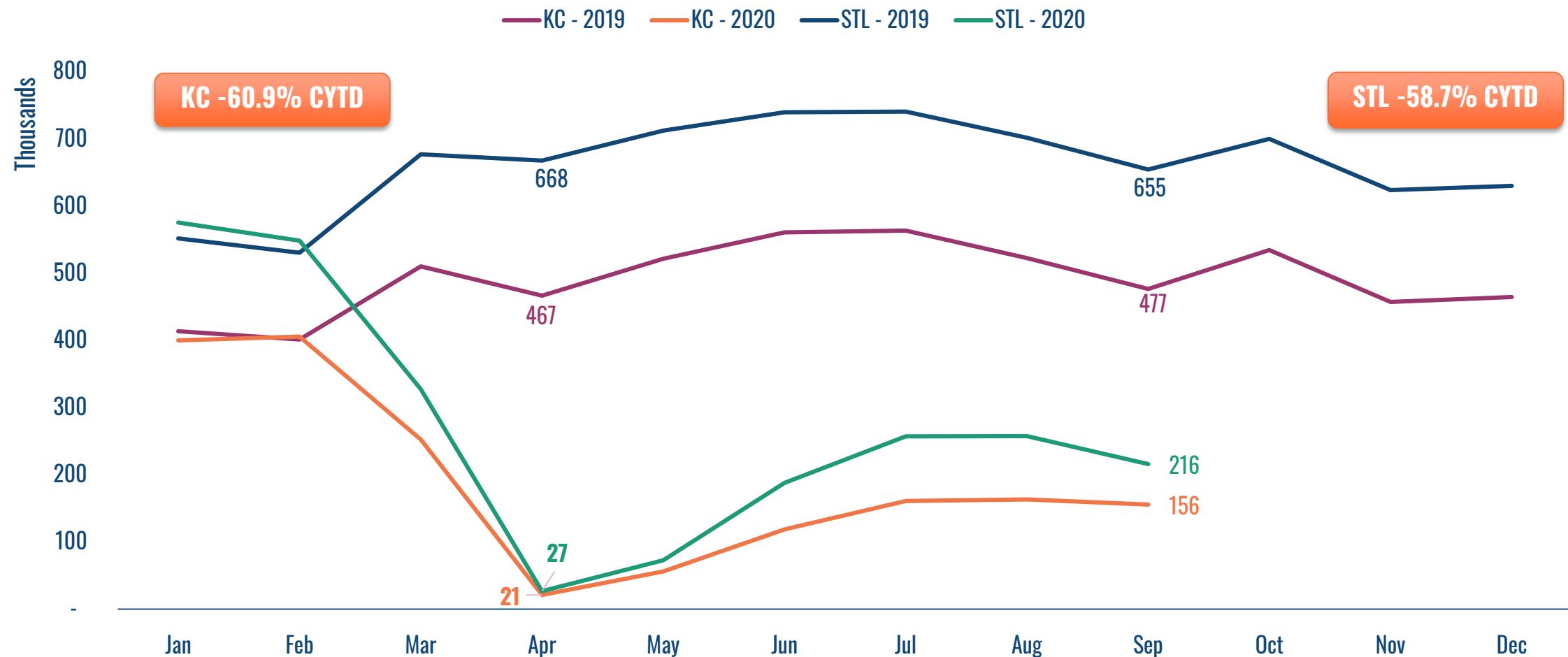
% of Change in Visits to Missouri National Parks
January – September 2020 Compared to 2019



Missouri Travel Barometer



KC & STL Airport Deplanements





THANK YOU

